

Business Intelligence Reporting

FI Demo 2: *Modifying a Basic Ad Hoc Query*

Washington State HRMS Business Intelligence (BI)
BI Power User Workshop Materials
General Topics - BI Financials Power Users

FI Demo 2: Modifying a Basic Ad Hoc Query

The following demonstration will show how to modify an existing ad hoc query and add features to the basic query created in FI Demo 1: Creating a Basic Ad Hoc Query.

- Payroll Costs by Biennium, AFRS Agency and Sub-Object
- Percentage of the overall costs by Biennium, AFRS Agency and Sub-Object
- Benefit costs by Biennium, AFRS Agency and Sub-Object

Concepts covered in this demonstration include:

- I. Saving a Query as a New Query
- II. Adding a Formula
- III. Adding a Restricted Key Figure
- IV. Running the Ad Hoc Query
- V. Ad Hoc Query Results
- VI. Bookmarking the Ad Hoc Query Results

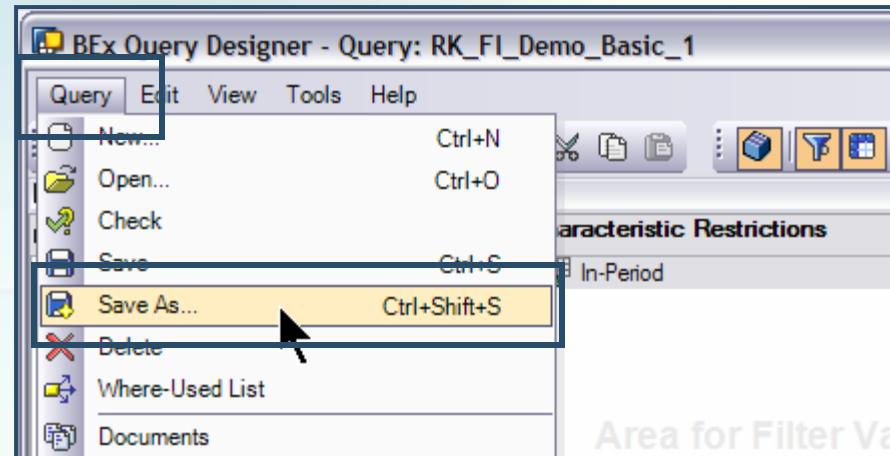
Display As Table Information Send Print Version Export to Excel Comments				
Columns		AFRS Dollars	Percentage	Benefit Costs Only (Object B)
<ul style="list-style-type: none"> Key Figures 		\$	%	\$
<ul style="list-style-type: none"> Rows 				
<ul style="list-style-type: none"> Biennium 				
<ul style="list-style-type: none"> Agency 				
<ul style="list-style-type: none"> Free characteristics 				
<ul style="list-style-type: none"> Sub-Object 				
2009	DEPARTMENT OF PERSONNEL	739,671.71	100.00000	156,753.01
	Result	739,671.71	100.00000	156,753.01
Overall Result		739,671.71	100.00000	156,753.01

FI Demo 2: Modified Ad Hoc Query Results

FI Demo 2: Modifying a Basic Ad Hoc Query

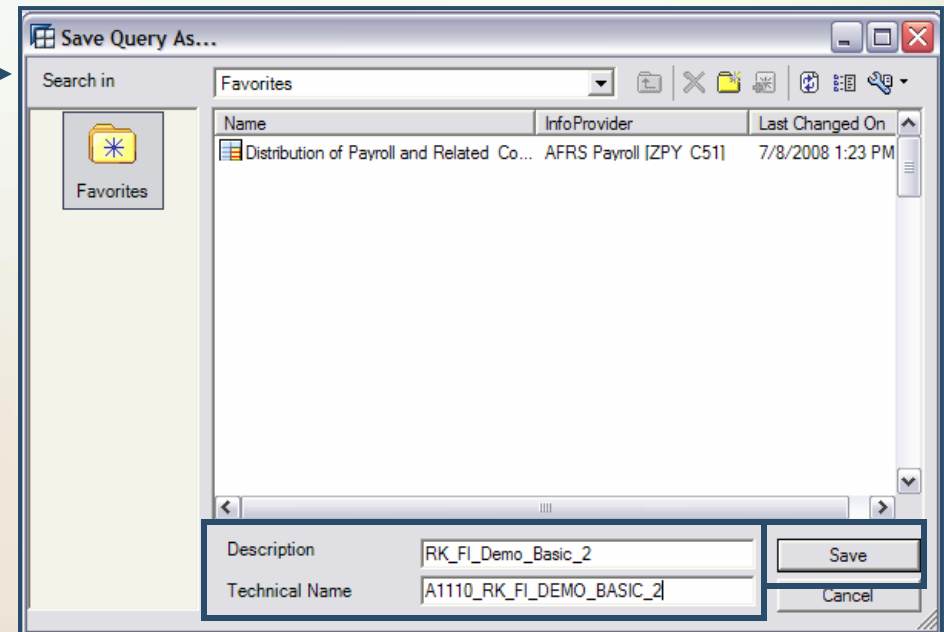
I. Saving a Query as a New Query

1. Open the Demo Basic FI Query Part 1 in BEx Query Designer.
2. Click the “Query” menu option and select “Save As...”.



Result: The “Save Query As...” screen will be displayed.

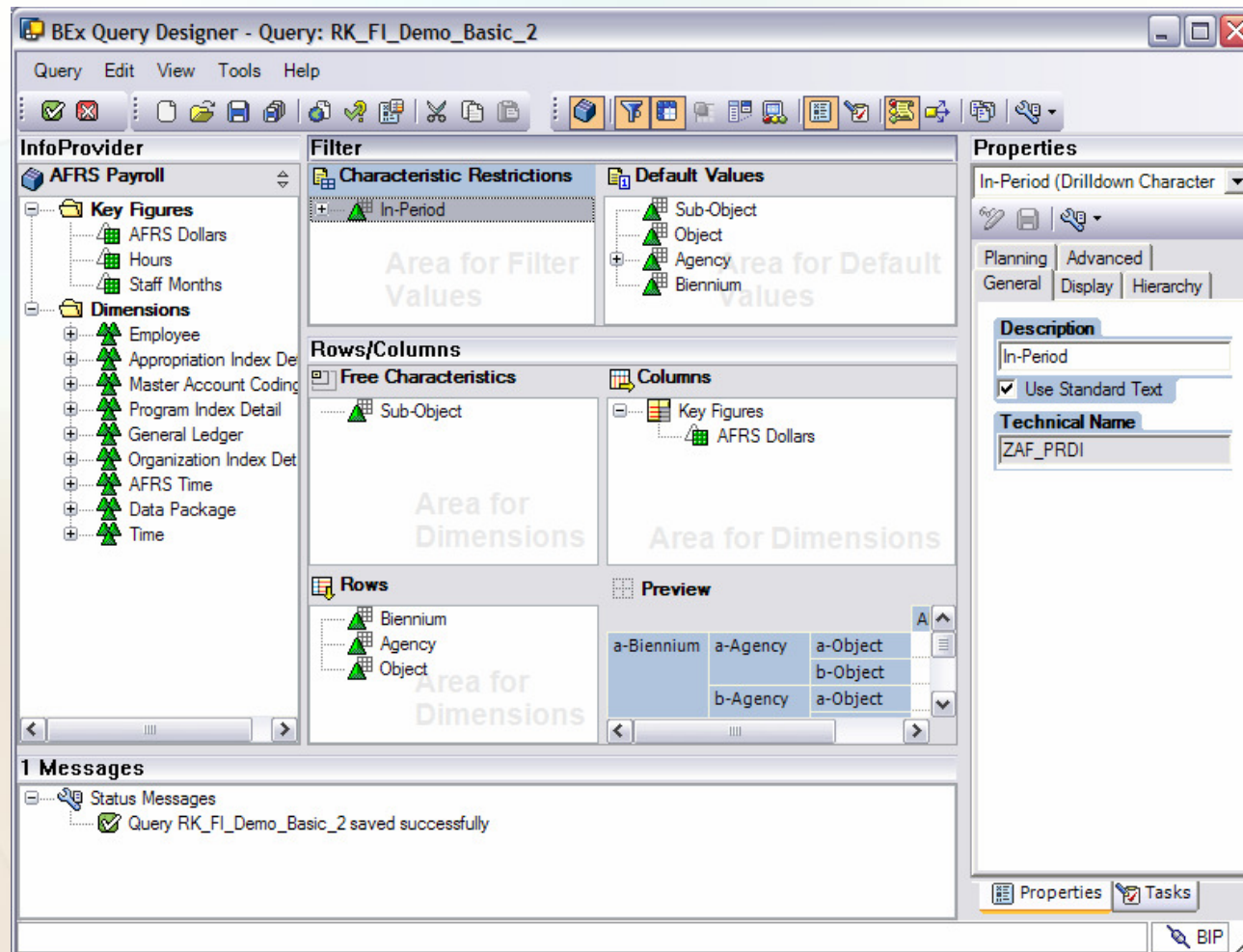
3. Enter description name in the Description text box of the “Save Query As...” screen.
4. Enter a new technical name in the Technical Name text box of the “Save Query As...” screen.
5. Click Save.



FI Demo 2: Modifying a Basic Ad Hoc Query

I. Saving a Query as a New Query, Cont...

Result: A new Ad hoc query will be saved and return the user to BEx Query Designer with the new ad hoc query displayed for modifications.

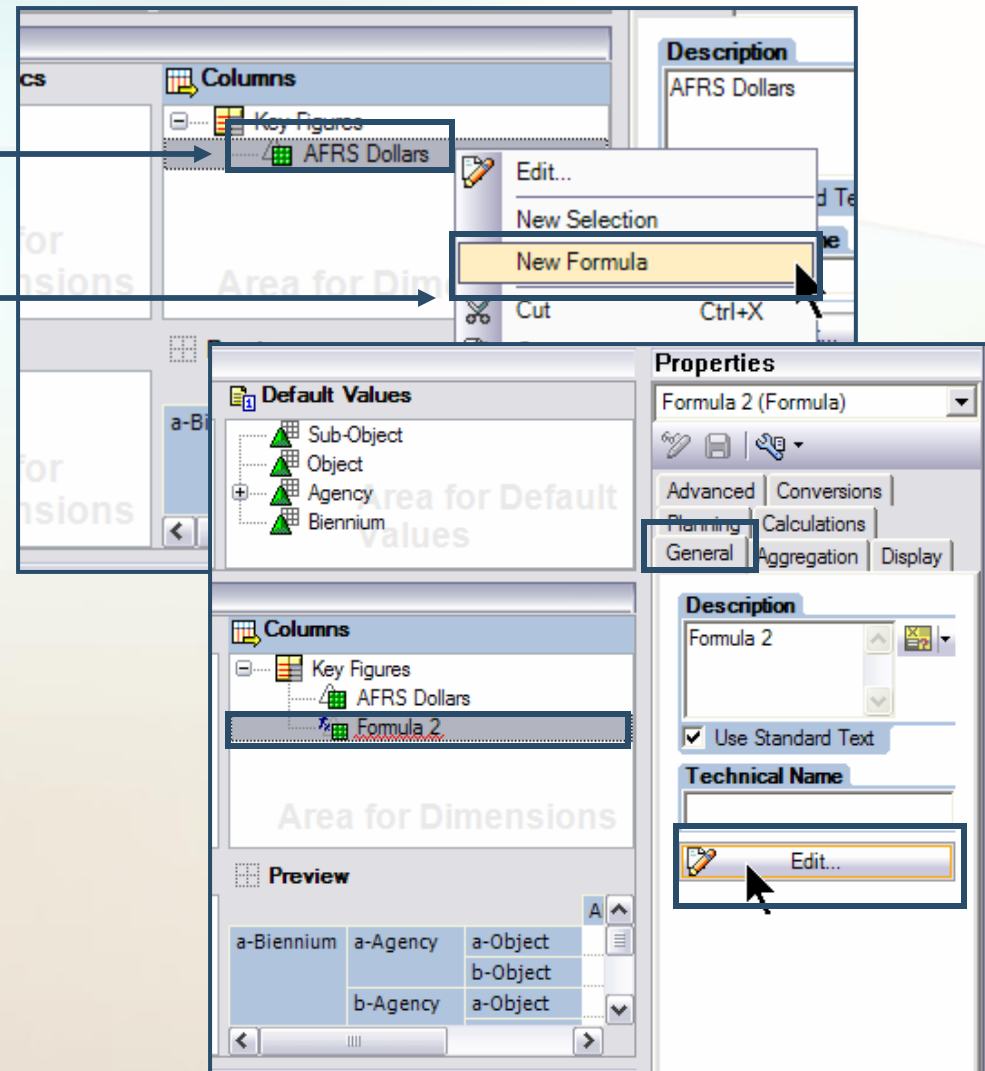


FI Demo 2: Modifying a Basic Ad Hoc Query

II. Adding a Formula

The demonstration below shows how to create a formula that will calculate the Percentage of the overall costs.

1. Right mouse-click AFRS Dollars to open the Context Menu.
2. Select New Formula.
3. Select the new "Formula" object that has been added.
4. Click "General" tab in the Formula Properties.
5. Click "Edit".



FI Demo 2: Modifying a Basic Ad Hoc Query

II. Adding a Formula, Cont...

Result: The Change Formula screen will be displayed.

6. Name the Formula Description "Percentage".
7. Expand the Percentage Functions folder in the Operators column.
8. Double-click the "Percentage Share of Overall Result" function to add it to the Formula field.

Result: The Percentage Function will be added to the Formula field.

Change Formula

General | Aggregation | Display | Advanced | Conversions | Planning | Calculations

Description
Percentage

Technical Name

☐ Use Standard Text

Detail View
%GT

1 2 3
4 5 6
7 8 9
0 .

+ - * / ** () % %A

Available Operands

- Key Figures
 - AFRS Dollars
- Formula Variable

Operators

- Basic Functions
- Percentage Functions
 - Percentage variance
 - Percentage share
 - Percentage share of result
 - Percentage share of overall result**
 - Percentage share of report result
- Data Functions
- Mathematical Functions
- Trigonometric Functions
- Boolean Operators

OK Cancel

FI Demo 2: Modifying a Basic Ad Hoc Query

II. Adding a Formula, Cont...

6. Position the cursor at the end of the Formula function in the Formula field.
7. Double-click the AFRS Dollars Key Figure in the Structure Elements of the Operands list. The Key Figure will be added to the Formula field.
8. Click OK.

Change Formula

General | Aggregation | Display | Advanced | Conversions | Planning | Calculations

Description
Percentage

Technical Name

☐ Use Standard Text

Detail View
%GT 'AFRS Dollars'

Available Operands
Key Figures
AFRS Dollars
Formula Variable

Operators
Basic Functions
Percentage Functions
Data Functions
Mathematical Functions
Trigonometric Functions
Boolean Operators

OK Cancel

Result: The New Formula has been added to the Key Figures section of the query.

Filter

Characteristic Restrictions
In-Period

Default Values
Sub-Object
Object
Agency
Biennium

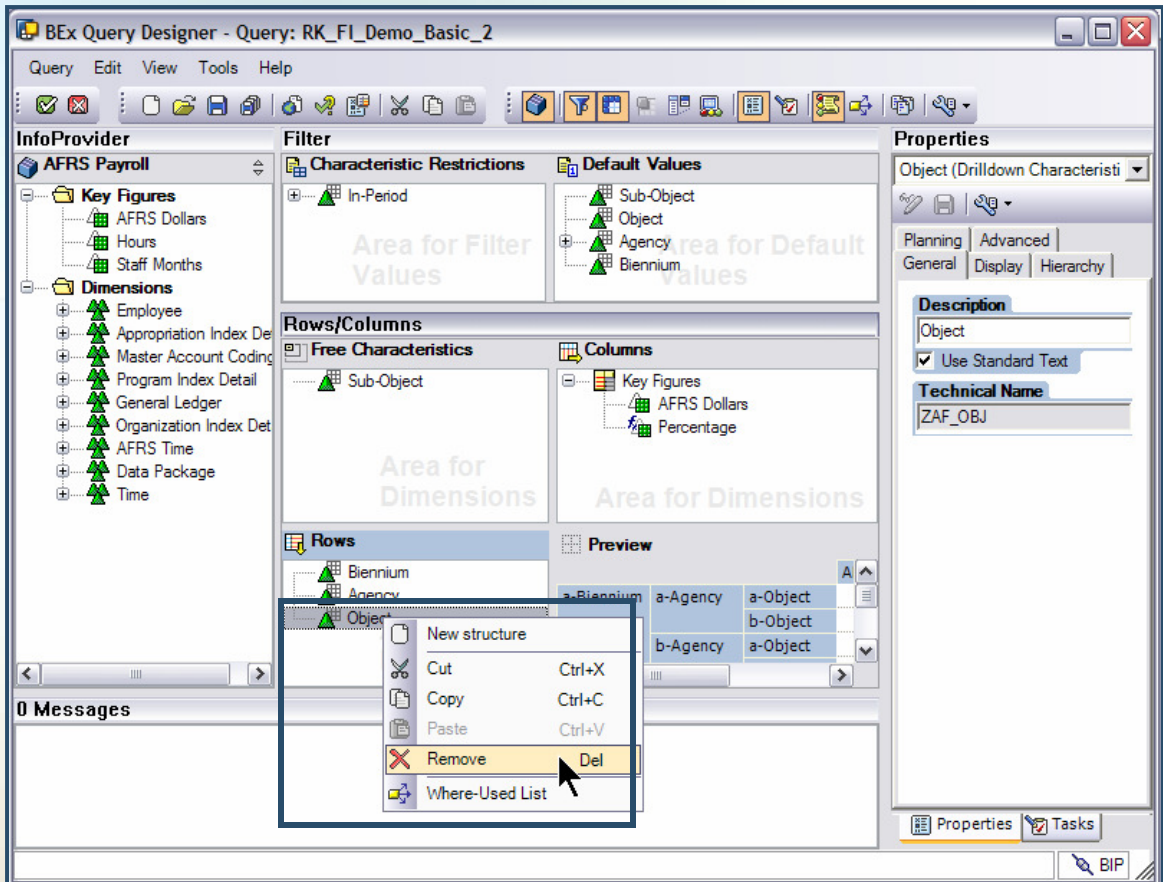
Rows/Columns
Free Characteristics
Sub-Object
Columns
Key Figures
AFRS Dollars
Percentage

FI Demo 2: Modifying a Basic Ad Hoc Query

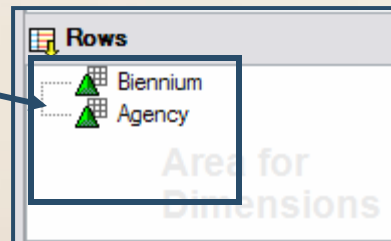
III. Adding a Restricted Key Figure

To add a Restricted Key Figure that shows the Benefit Costs only, first delete the Object Characteristic from the Rows section of the query:

1. Right mouse-click the Object Characteristic in the Rows section of the query to open the Context Menu.
2. Select Remove.



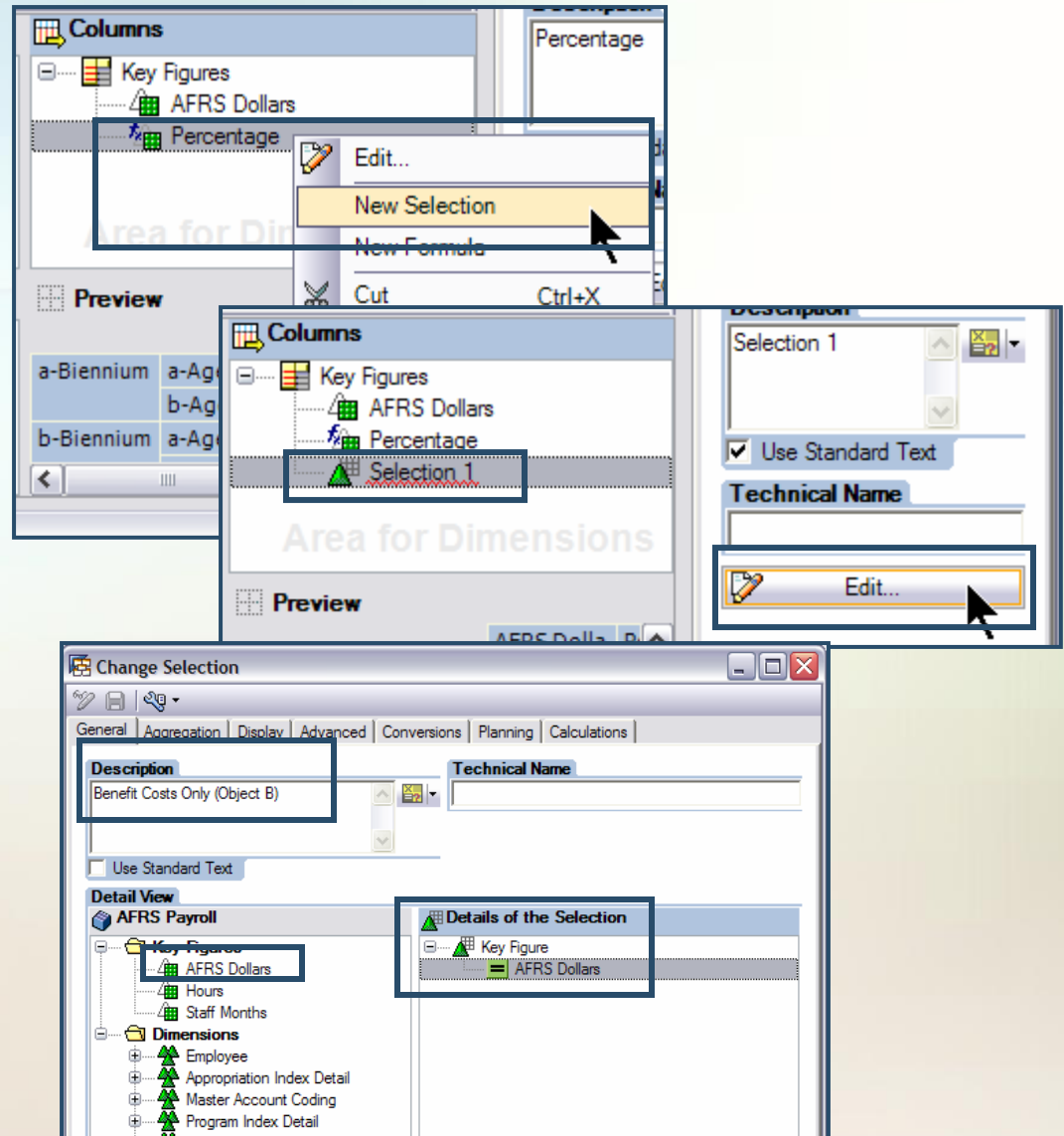
Result: The Object Characteristic will be deleted from the query.



FI Demo 2: Modifying a Basic Ad Hoc Query

III. Adding a Restricted Key Figure, Cont...

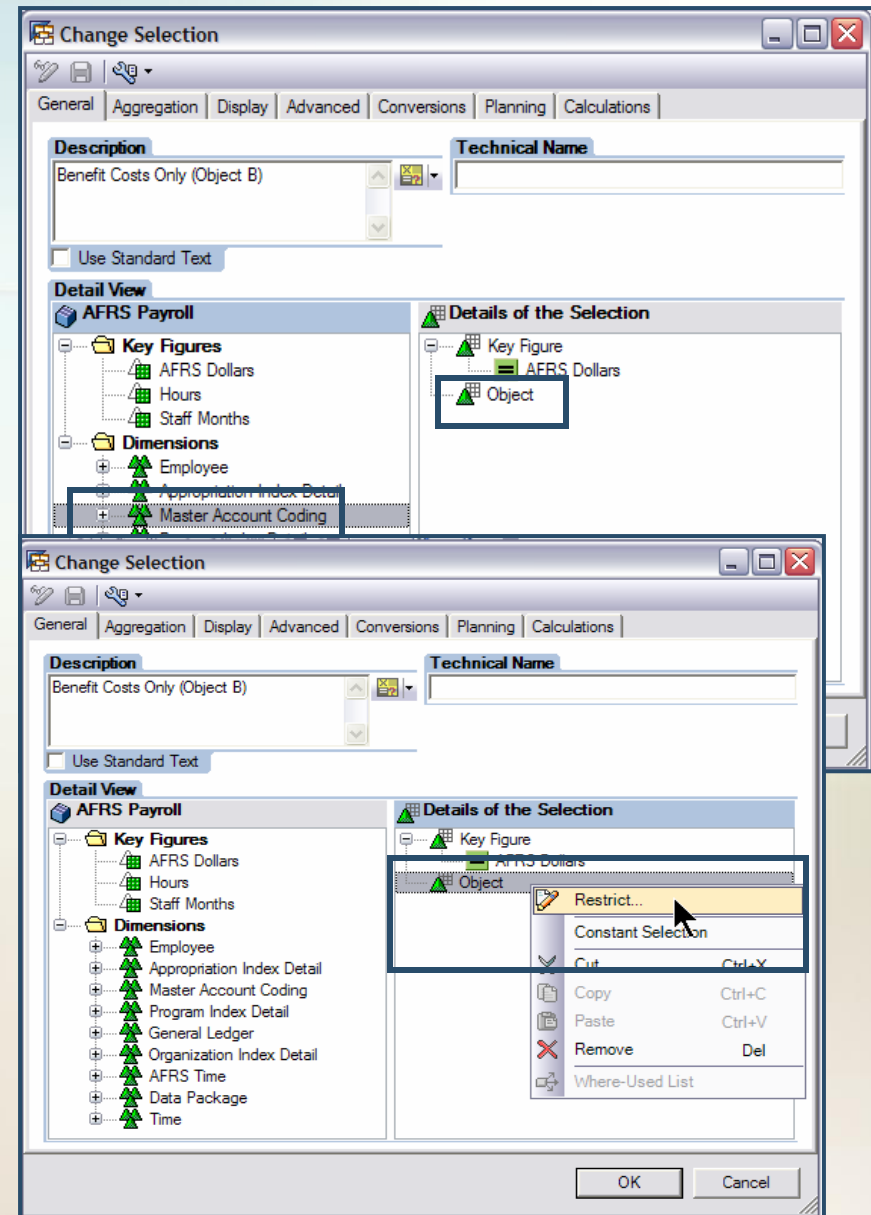
3. Right mouse-click Percentage in the Columns section of the query to open the Context Menu.
4. Select New Selection.
5. Select the "Selection" object that has been added.
6. Click "General" tab in the Selection Properties and click "Edit".
7. Rename the Key Figure to "Benefit Costs Only (Object B)" in the Description field.
8. Drag&Drop the AFRS Dollars Key Figure to the "Details of the Selection" column.



FI Demo 2: Modifying a Basic Ad Hoc Query

III. Adding a Restricted Key Figure, Cont...

9. Drag&Drop the Object Characteristic from the Master Account Coding Dimension to the Description column.
10. Right mouse-click the Object Characteristic in the Description column to open the Context Menu.
11. Select Restrict.



FI Demo 2: Modifying a Basic Ad Hoc Query

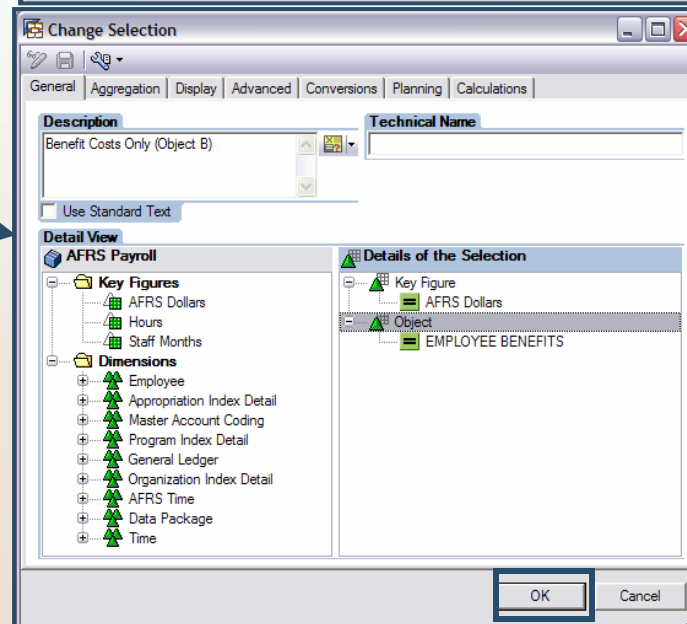
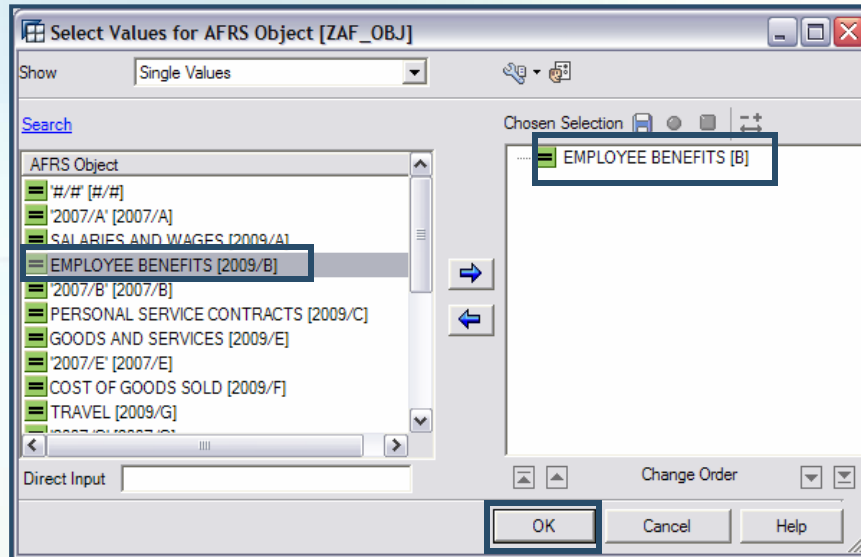
III. Adding a Restricted Key Figure, Cont...

10. Drag&Drop Employee Benefits from the AFRS Object column to the Chosen Selection column.

11. Click OK.

Result: The Employee Benefits Characteristic restriction has been added to the AFRS Dollars Restricted Key Figure.

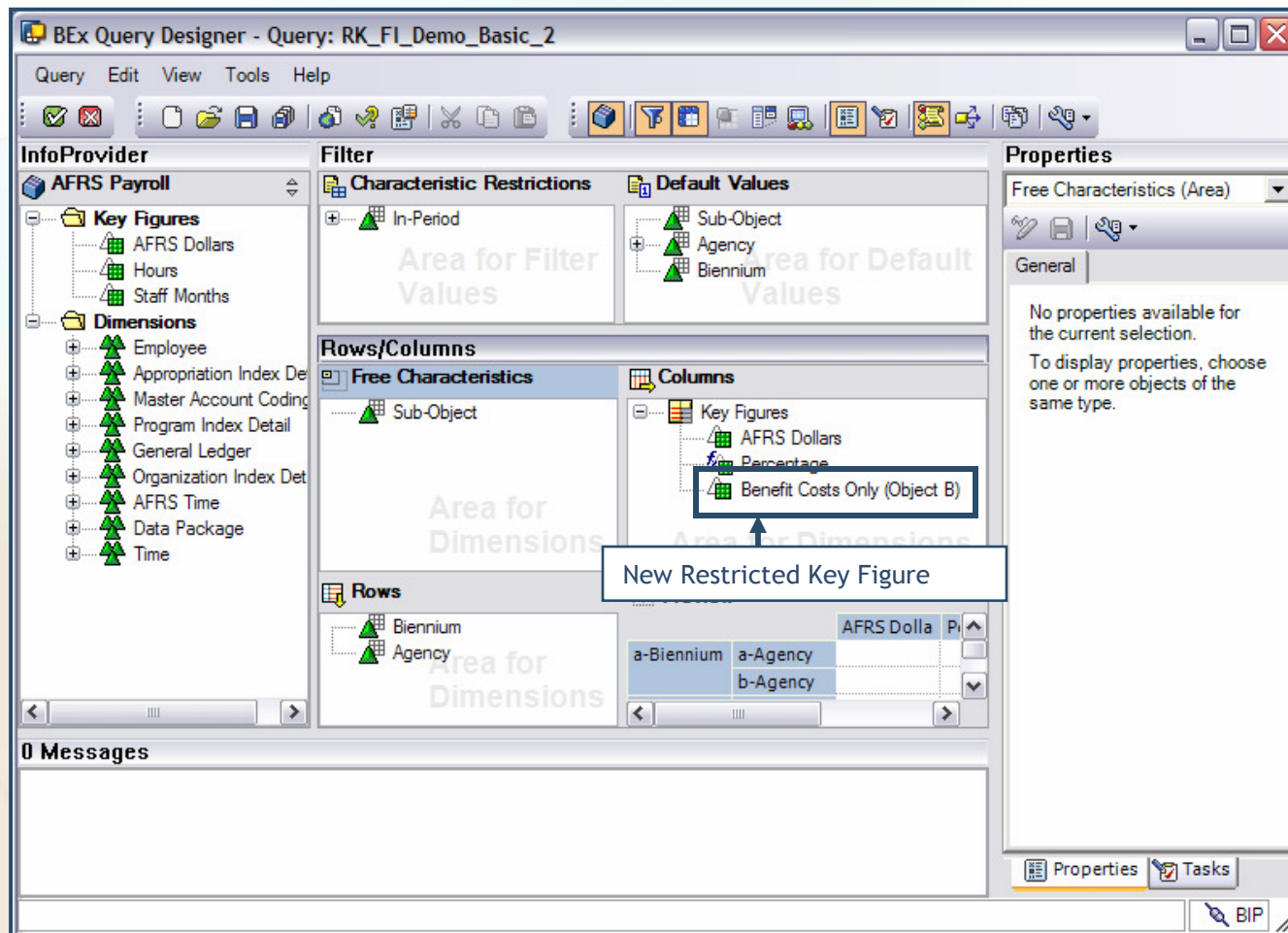
12. Click OK to close Change Selection screen.



FI Demo 2: Modifying a Basic Ad Hoc Query

III. Adding a Restricted Key Figure, Cont...

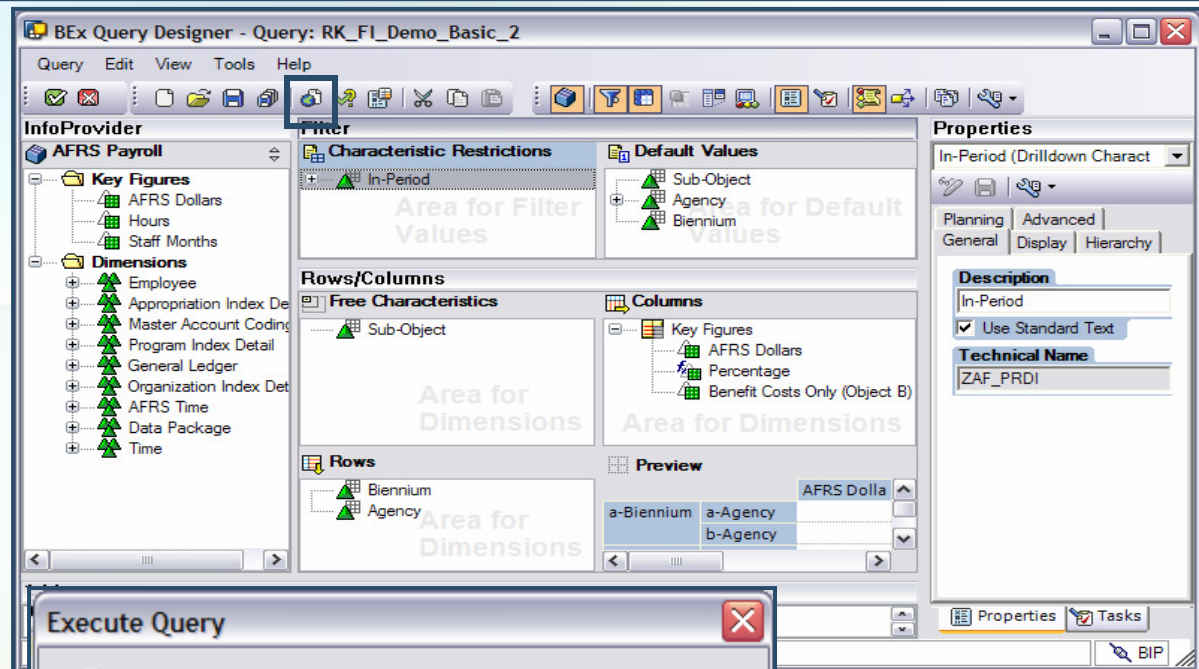
Result: The Benefit Costs Only (Object B) Key Figure has been added to the Columns section of the query. This Key Figure will display the Benefit Costs in the query results.



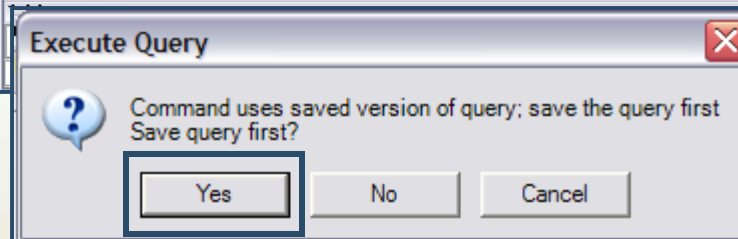
FI Demo 2: Modifying a Basic Ad Hoc Query

IV. Running the Ad Hoc Query

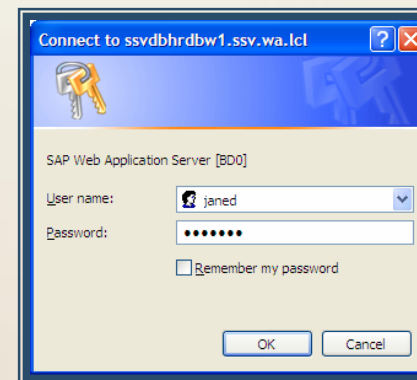
1. Click the Execute Query on the Web icon  from the BEx Query Designer toolbar.



If prompted to Save the query, click Yes.



If prompted, enter your BI User Name and Password and click OK.



FI Demo 2: Modifying a Basic Ad Hoc Query

IV. Running the Ad Hoc Query, Cont...

Results: The Variables Entry screen will be displayed (if the user is running an ad hoc query without variables, this screen will not be displayed)

2. Enter report Variables.

3. Click OK.

Variable Entry

Available Variables: Save Save As... Delete [Show Variable Personalization](#)

Variable	Current Selection	Description
In Period (yyyypp)		
Agency		

OK Check

FI Demo 2: Modifying a Basic Ad Hoc Query

V. Ad Hoc Query Results

RK_FI_Demo_Basic_2

Display As Table Information Send Print Version Export to Excel Comments

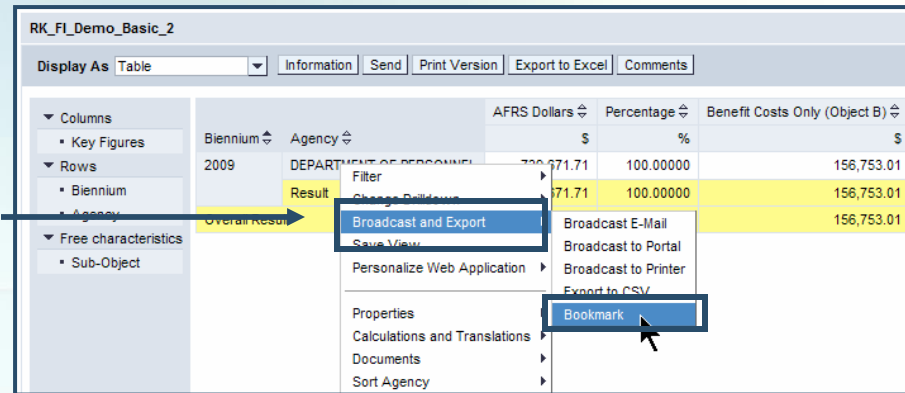
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	Result	739,671.71	100.00000	156,753.01
	Overall Result	739,671.71	100.00000	156,753.01
Free characteristics				
Sub-Object				

Drag&Drop Sub-Object from the Navigation block to the report results to add Sub-Object to the results.

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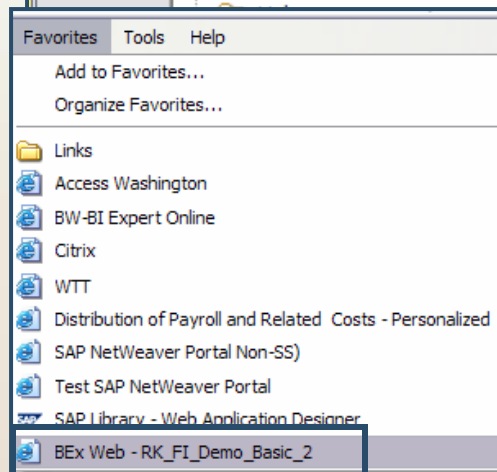
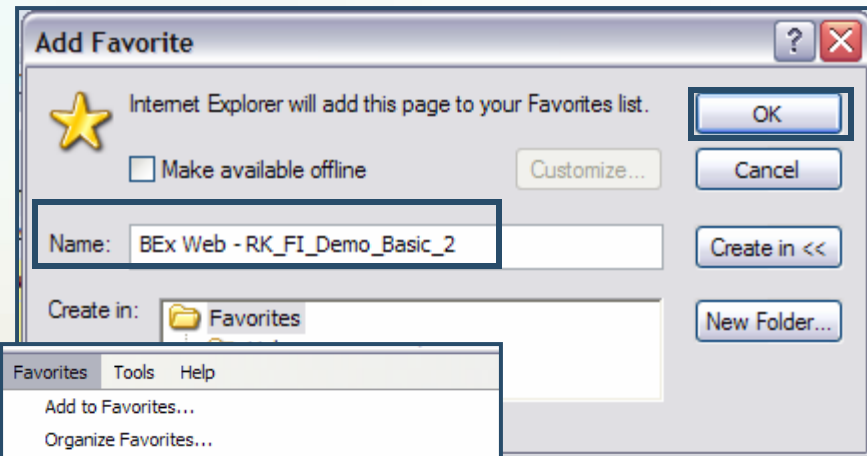
VI. Bookmarking the ad hoc Query Results

1. Click an item in the query results to open the Context Menu.
2. Select Broadcast and Export → Bookmark.



Result: A new URL will be created for the Bookmarked query results.

3. Add Favorite popup will be displayed. You can leave the name as it is or change it.
4. Click OK



New Favorites link has been added.

FI Demo 2: Modifying a Basic Ad Hoc Query

VI. Bookmarking the ad hoc Query Results, Cont...

To delete the Bookmarked query from your Favorites, right mouse-click the Bookmark link in the Favorites folder to open the context menu and click Delete.

